

## 2006-2012 CAPITAL PLANNING SYSTEM USER MANUAL

### Status of Recently Completed / Ongoing Projects (Form SYP-B5)

Upon choosing Form SYP-B5 from the **SELECT OPTION** page, a listing of all projects that have already been entered into the system will be displayed in alphabetical order by project title. For each project, this display also reflects the project status, and the total budget as currently authorized (according to records available to CPAB staff).

From this project listing, the user may take any of the following actions (the steps to do each operation are shown in *italics*)

- Retrieve the detailed data for a specific project to review and edit
  - *Select [Edit] on the project line*
- Add a new project and the accompanying detailed data
  - *Select [Add New Project] at the bottom of the page*
- Search for and display a list of projects that include a specific phrase, entire word, or group of letters in the title
  - *Enter that phrase, word, or group of letters in the space provided above the project list and press [Search] or strike <Enter>.*
- Return to the complete project listing after the Search list has been displayed
  - *Press [Reset] above the project list*
- Sort and display the project list based on any of the headings/categories that are shown
  - *Click on the heading that is to be the basis of the sort*
- View and/or print the detailed data for a single project
  - *Select [View] under the Reports column on the project line*

Note: Changes to the data or the deletion of an entire project in the listing can be done only by accessing the project form. Changes or deletions cannot be made directly to this listing.

### NAVIGATING THE PROJECT LISTING

If there are more than 15 projects, they will be listed on multiple pages (15 projects per page). Up to 10 pages will be identified at the bottom of the screen of the selected page, click on the ellipse (. . .) to go to pages other than the 10 listed. The bottom of the page will also display the total number of pages and the current page number (Viewing page \_\_ of \_\_).

### PRE-POPULATED DATA

Form SYP-B5 has been pre-populated, to the extent possible, with existing data. Agencies are to carefully review the data provided and make any appropriation changes or additions. The Project Status section will not be pre-populated.

## ENTERING DATA

To move between fields on Form SYP-B5, use the <Tab> key or the mouse.

After completing the data entry, selecting [Save Changes] will save the information to the database if all required data have been entered (see Required Data Fields below). The other option at this point is to [Cancel] which returns the user to the Status of Recently Completed/Ongoing Projects listing, without saving any new or changed data.

## TYPES OF DATA

Data on Form SYP-B5 is comprised of yes/no responses, selections from picklists, text, and numeric entries.

Yes/No.....Click to fill in the circle to the left of the Yes or No response. (If “yes,” be sure to complete the required narrative in the next field.)

Picklists .....Click on the down arrow to the right of the data entry field to access the available options.

Text.....Enter text as in a word processing application. Use the up and down arrows to view contents of the field. A Typing Progress Bar will show the character limit for that field and how close the user is to that limit as the narrative is being entered.

Numbers .....Enter figures with or without commas (,); commas will be inserted automatically. Select [Calculate] to generate and display totals.

## DELETING A PROJECT

To delete a proposed project, select [Edit] from the Form SYP-P5 listing then select [Delete] at the top of the project page. The user will be prompted to confirm that the intent is to completely remove the project from the system.

## PROJECT BUDGET

The [Calculate] button next to the total line must be selected in order to re-generate the total.

The Annual Use Allowance field is to be used for court facilities projects only.

## REQUIRED DATA FIELDS

Data must appear in the Project Title field before the system will accept the [Save Changes] instruction on Form SYP-B5.

Before the cabinet/agency contact can submit the completed agency plan to CPAB, the system will run a series of checks to ensure that all required data fields have been completed. The plan will not be submitted unless all required fields are completed. In addition to the Project Title, the following will also be checked on Form SYP-B5:

- Has the Location field been completed?
- Has the Project Type field been completed?
- Has at least one Authorization and accompanying Description for the project been identified?
- Has the Project Budget been completed? Has the annual use allowance been specified if the project is a court facility?
- Has the Current Status field been completed?
- Has a valid Completion Date been entered in the proper format?
- Has the Current Description field been completed?
- For each field requiring a yes or no response, is yes or no selected?
  - If yes is selected, is the narrative field following that question completed?
  - If no is selected, is the narrative field following that question blank?
- For each item in which “other” has been selected as the response, has “other” been described in the field provided?

### PRINTING REPORTS

In addition to the ability to print data for individual projects from the on-screen listing, reports for multiple projects can be printed by choosing “View/Print Reports” under Agency Level Reports on the **SELECT OPTION** page. Options are available here to print the following project status reports:

- All Projects – Alphabetical by Project Title
- Construction Only – Alphabetical by Project Title
- Equipment Only – Alphabetical by Project Title
- Information Technology Only – Alphabetical by Project Title
- Grant/Loan Programs Only – Alphabetical by Project Title

All reports are provided in PDF, which requires the Adobe Acrobat Reader. (This software may be downloaded from the capital planning system **HOME** page.)